

Creating and Updating a User Maintenance Document (UDOC)

This procedure documents the steps necessary to create and maintain a UDOC in AFIS. A UDOC will enable you to setup a new user or maintain an existing user. The most common use of the UDOC will be to create new application users. The UDOC contains all the information (required and optional) that is normally presented as part of new user setup. For users that are already defined, the user maintenance document can be used to modify or remove their permissions and settings within the system. Users should reference the State of Arizona Accounting Manual found on GAO's Web Site (gao.az.gov) to review the internal control policies (05-05 General Internal Controls and 05-10 Internal Controls by Process).

Procedure - Creating a UDOC

- A. Log into AFIS.
- B. **Navigate** to the UDOC documents in the document catalog.
 1. In the Jump to field, enter **UDOC**.
 2. Click **Go**.
- C. **Create** a UDOC document.
 1. Click **Create**.
 2. In the **Code** field, enter **UDOC**.
 3. In the **Dept.** field, enter **your department code**.
 4. In the **ID** field, enter user's information: **Last name First initial1 (SmithJ1)**.
 5. Click **Create**. A new document is generated.
- D. Complete the **Header** component.
 1. On the Header component, select the **Add** button.
 2. In the **User ID** field, enter the **user's EIN (or PIN) number**.
 3. On the Directory Information tab of the Header, in the **Last Name** field, enter the **user's last name**, Sentence Case (ex. Smith).
 4. In the **First Name** field, enter the **user's first name**, Sentence Case (ex. Jane).
 5. In the **Email Address** field, enter the **user's email address**.
Note: It is important that the email address be correct! This address is used to notify the user of their user id and password.
- E. Complete the **Home Organization** tab.
 1. In the **Department** field, enter the **user's 3-character department code**.
 2. Click **Save**.

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F. Complete the **Password Maintenance** tab on the Header.

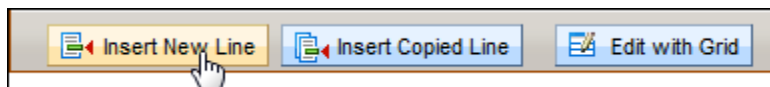
1. Select the **Reset Password** button.

Note: This will prompt the new user to create their unique password when they log into AFIS.

2. In the **Password** field, enter **Afis@1234**.
3. Click **Save**.

G. Complete **Security Roles** component.

1. Click **Insert New Line** at the bottom of the section.



2. Select the **Add** button.
3. In the **Security Role ID** field, select the correct security role for this user.
4. In the **Precedence** field, enter the sequential number for the role. If this is the first role assigned, the Precedence would be 1.

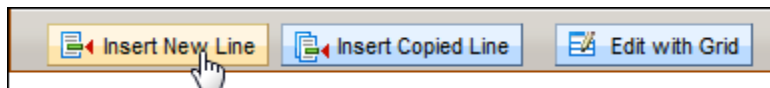
Note: If you are updating a UDOC, increase the Precedence number for each change.

5. Click **Save**.

Note: Multiple security roles may be assigned to a user by repeating step G2-G6.

H. For managers only! Complete **Workflow Roles** component.

1. Click **Insert New Line** at the bottom of the section.

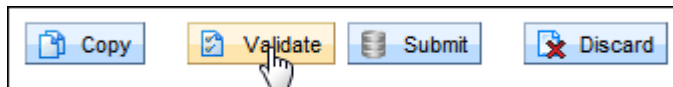


2. Select the **Add** button.
3. In the **Role ID** field, select the correct role for this manager.
4. Select the **Manager** checkbox.
5. Click **Save**.

Note: Multiple workflow roles may be assigned to a manager by repeating step H2-H5.

I. Check the UDOC document for errors and submit it.

1. Click the **Validate** button to check for errors. If any errors exist such as missing values in required fields, fix the errors and click the **Validate** button again.



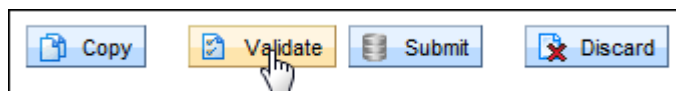
J. If the validation is successful, the following message is displayed in the upper left corner of the screen: **"Document validated successfully."**

1. Click the **Submit** button to submit the document for approval once the document has been successfully validated and all values on the posting line are correct.

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Procedure - Updating User Permissions

- A. Log into AFIS.
- B. Navigate to the UDOC page.
 1. In the Jump to field, enter **UDOC**.
 2. Click **Go**.
- C. Create a UDOC document.
 1. Click **Create**.
 2. In the **Code** field, enter **UDOC**.
 3. In the **Dept.** field, enter **the user's department code**.
 4. In the **ID** field, enter user's information: **Last name First initial2 (SmithJ2)**.
 5. Click **Create**. A new document is generated.
- D. Complete the **Header** component.
 1. Select the **Update** button.
 2. In the **User ID** field, enter the **user's EIN number** or use the picklist to locate the User ID.
 3. Click **Populate From Existing User** to fill in the current assignments for the user.
 4. Make the necessary updates. You can:
 - i) Add Security Roles, and/or Workflow Roles
 - ii) Update Security Roles, and/or Workflow Roles.
 - iii) Delete Security Roles, and/or Workflow Roles.
 5. Click **Save**.
- E. Check the UDOC document for errors and submit it.
 1. Click the **Validate** button to check for errors. If any errors exist such as missing values in required fields, fix the errors and click the **Validate** button again.



- F. If the validation is successful, the following message is displayed in the upper left corner of the screen: **"Document validated successfully."**
 1. Click the **Submit** button to submit the document for approval once the document has been successfully validated and all values on the posting line are correct.